datadive

powered by MGMA

DATA COLLECTION

USER GUIDE | 2027



NEW DATADIVE DATA COLLECTION AUTOMATION

Data collection gets easier every year! Integrating participant feedback, we have simplified our data collection to an easy three step process.

1. Complete/Review Practice Data
2. Upload Files
   - Compensation / Payroll / Census Data
   - CPT / Billing / Claims Data
   - Financial Operations / P&L / Income Statement / General Ledger
3. Mapping Crosswalk & Submit

For in-depth instructions, we created this helpful guide to walk you through the process!

Still have questions? Reach out to our Data team at survey@mgma.com.

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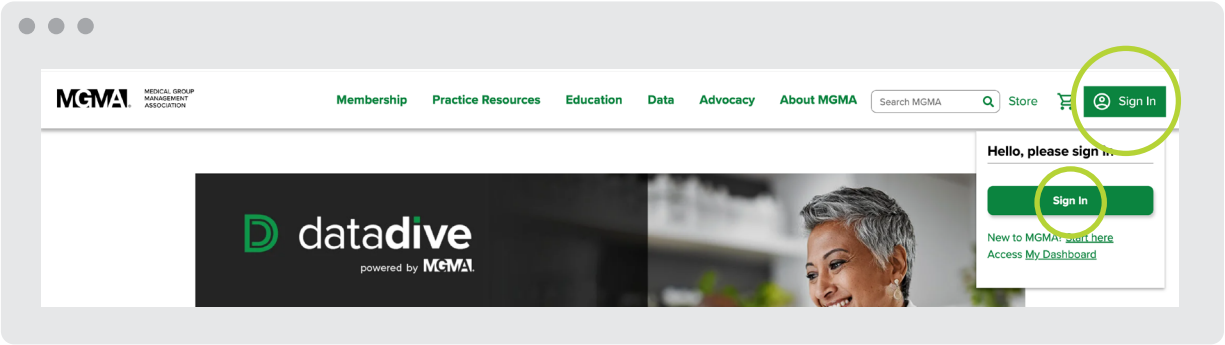
Complete your Mapping Crosswalk 7

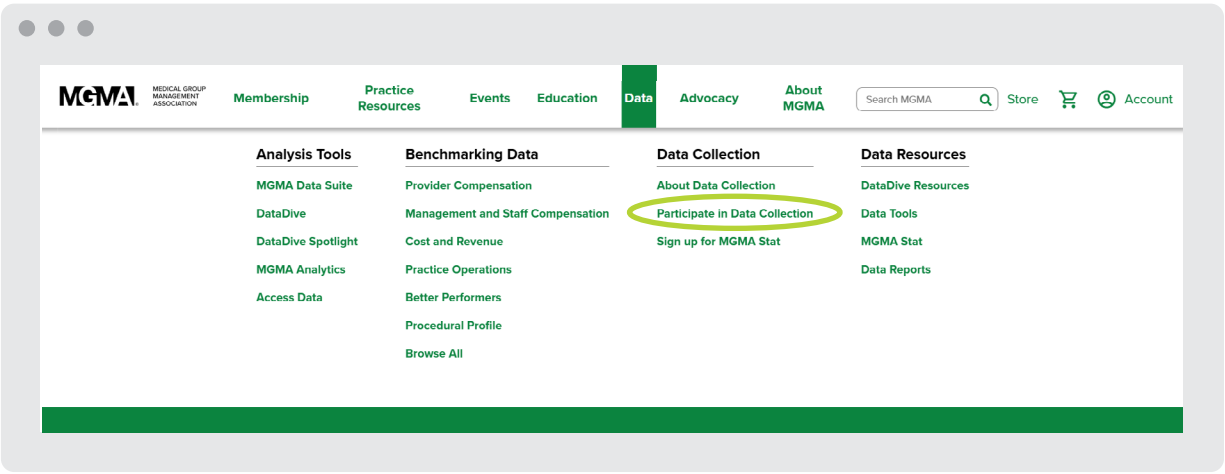
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ACCESSING THE DATA COLLECTION PLATFORM

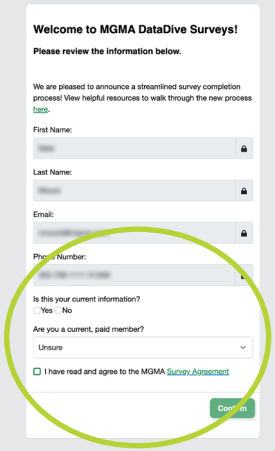
1. Visit **mgma.com**
2. Sign in with your existing MGMA account credentials by clicking **"SIGN IN"** in the navigation bar.
3. Access Data Collection in one of two ways:
   a. After signing in, click on the **"DATA"** tab in the navigation bar and select **"PARTICIPATE IN DATA COLLECTION"**
   b. Type "**survey.mgma.com**" in the URL search bar (bookmarking this page is recommended).
4. Upon initial entry, you will be prompted to confirm your contact information and accept an updated data license agreement.



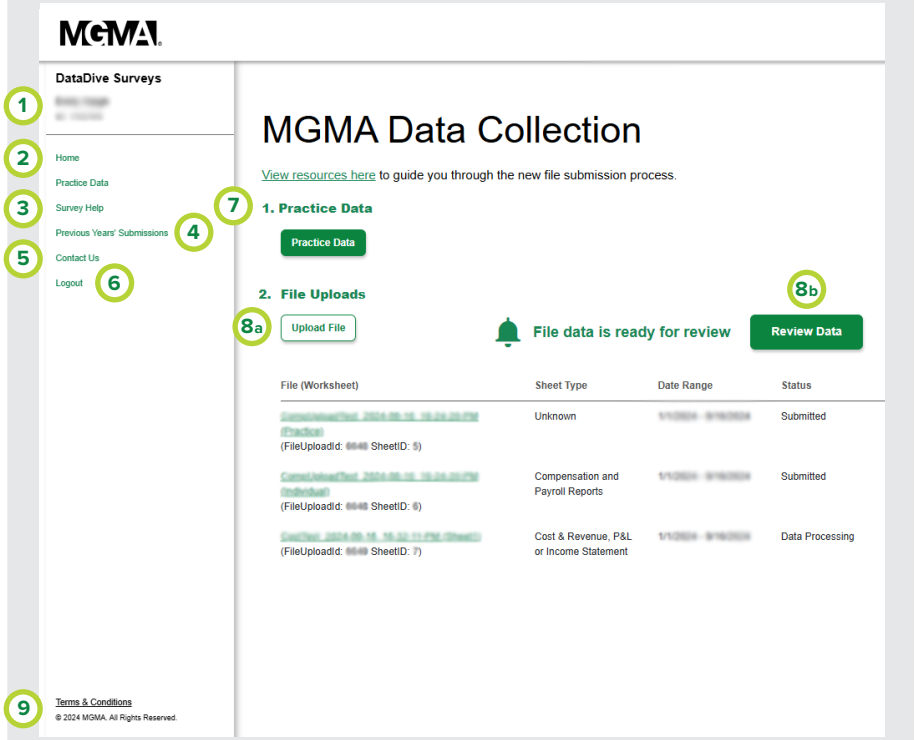


GETTING AROUND: A VISUAL GUIDE

1. **Your MGMA ID:** This is the MGMA ID associated with the account. If you submit questions for assistance, please include your MGMA ID with your inquiry.
2. **Home:** Use the left navigation to return to this home page.
3. **Data Collection Help:** View helpful resources to guide you through Data Collection completion, including templates and definitions.
4. **All Years' Submissions:** Access Data Collection submitted in previous years. Please note that Data Collection submitted by someone else within your organization may not be displayed.
5. **Contact Us:** If your questions can't be answered with resources in the Data Collection Help menu, you can find our contact information here to receive one-on-one support.
6. **Logout:** Once finished with the submission, or if you need to step away, log out of the Data Collection platform here. Please note that the platform will automatically log out after 20-minutes of inactivity.



Please note: *Upon initial entry into the Data Collection, you will be prompted to verify your contact information, indicate your MGMA Membership status and accept the Data Collection legal agreement.*



7. **View All Practice Data:**
   If you have participated in the past, the practice demographic information may already be pre-filled. Click Practice Data to download, review, and make any necessary updates.

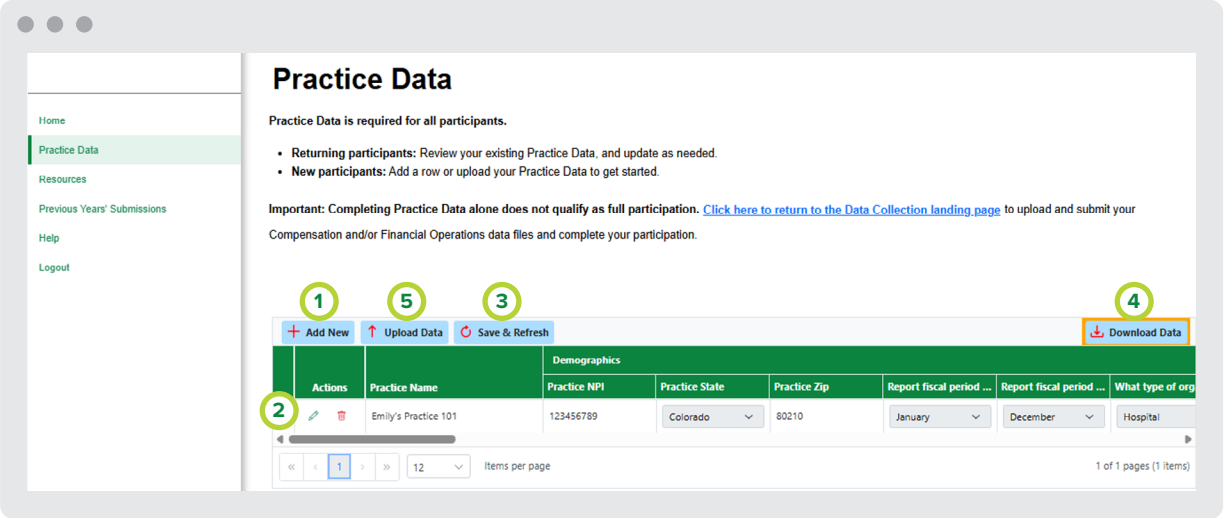
   Note: If you have not participated in the past, please complete the practice demographic information before uploading files for Data Collection completion.

8. **Actions:**
   a. Click the Upload File button next to the file type intended to be uploaded. The specified file type as well as the status associated with each is displayed.
   b. By clicking the Review Data button, the files that have already been uploaded can be reviewed.
9. **Terms and Conditions:** The full Data Collection agreement can be viewed here.

COMPLETE/ REVIEW YOUR PRACTICE DATA

Click through each tab of the Practice Data section (Practice Demogs, Practice Structure, Hours of Operation, Practice Systems) to complete and/or review each section. If these details are not already pre-filled, completing these fields is a one-time investment. This information is saved and will only need to be updated if any of these details change.

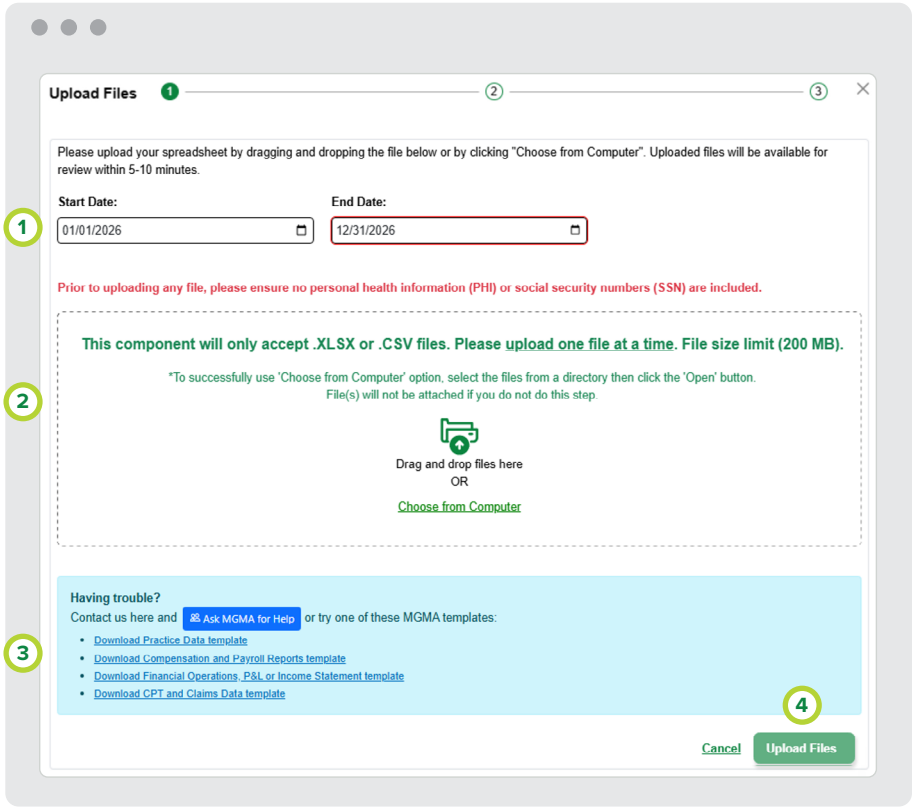
1. **Add Practice:** Click Add New to add a new row for inputting additional practice(s).
2. **Delete Selected:** If a listed practice should be excluded from your data submission, check the box(es) next to the appropriate practice and then click the Trash Can icon.
3. **Save:** To save your practice data, click Save.
4. **Download:** You may view the practice data in Excel format and/or make updates via Excel by using the Download Data button.
5. **Upload:** To save any updates made via Excel, click the Upload Data button and upload your practice data file.



DATA COLLECTION FILES AND UPLOADING

Once you have confirmed your Practice Data is up to date, you can go back to Home to upload your files. Upon clicking the Upload File button *(see Step 8 in Getting Around: A Visual Guide)*, you will be prompted with the following:

1. **Select the Timeframe:** Indicate the Start and End dates for which your submission represents.
2. **Upload your File(s):** Either drag-and-drop, or click **"CHOOSE FROM COMPUTER"** and find your file(s) to upload.
3. **MGMA Sample Templates:** An example file with required MGMA headers can be downloaded to provide guidance on data for inclusion in your submission.
4. **Upload:** After you have selected the file(s), click Upload Files. Now you are ready to map and review your files!



COMPLETE YOUR MAPPING CROSSWALK

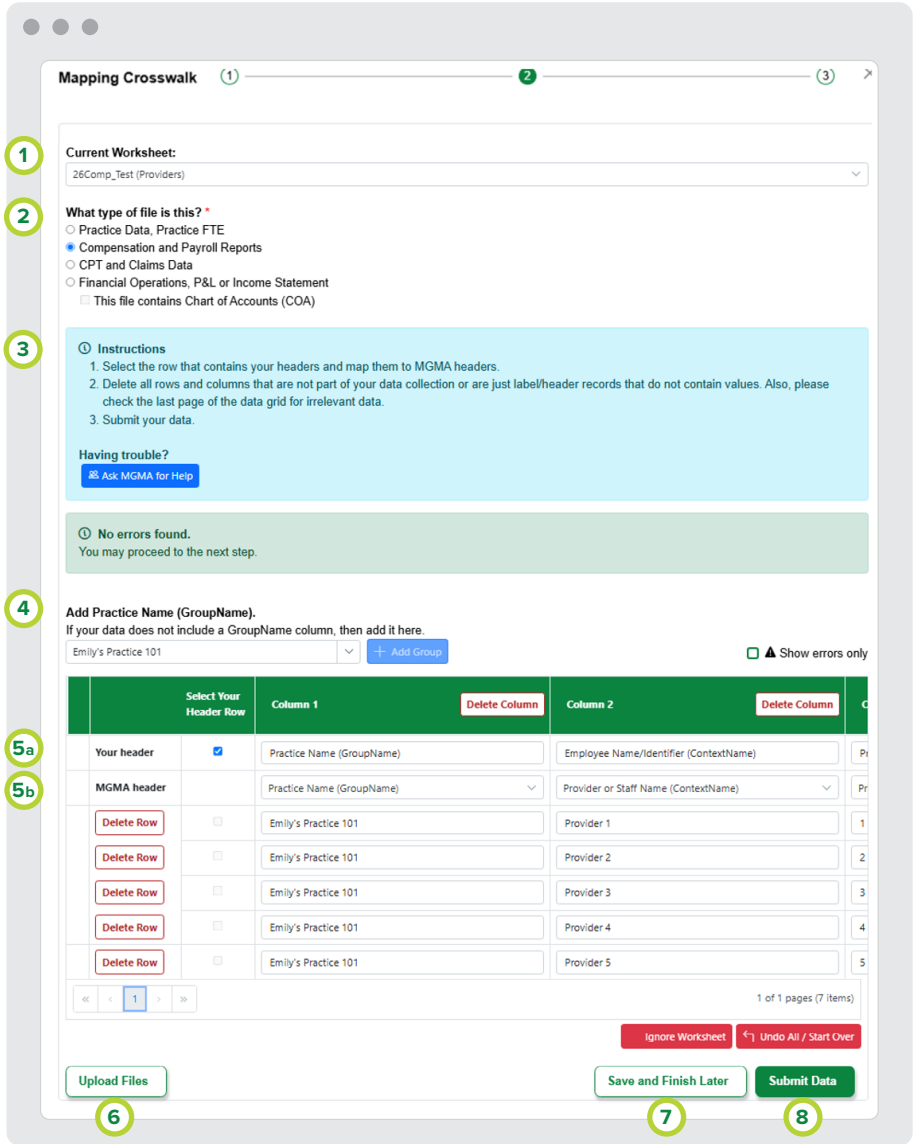
Once files have been uploaded, you will be prompted to review your file headers to ensure alignment across the MGMA fields. Our system does its best to match your headers, but if any are incorrect, please update as necessary.

1. **Current worksheet:** Select a worksheet from your submitted files to complete the mapping crosswalk.
2. **What Type of File is This:** Indicate the appropriate file type reflected in the worksheet selected.
3. **Instructions:** In this section you will find a list of tasks that you need to completed before submitting your data to MGMA.
4. **Add Practice Name:** If the file you upload does not include your practice name, please select from the dropdown list or type in a new practice name.

5a. **Select Your Header Row:** In order map your headers, indicate the row your headers start on. After selecting your header row, a dropdown menu will appear.

5b. **MGMA Header:** This row will appear after you select you header row. Click through each dropdown menu and select the MGMA header that aligns with yours. Headers that are recognized by our system will auto-populated for you and should be reviewed to confirm accuracy.

6. **Upload Files:** To upload additional files, click Upload Files.
7. **Save and Finish Later:** To save your progress and complete your mapping crosswalk later, click Save and then exit out using the “X” in the top right hand corner.
8. **Submit Data:** Shares your data with MGMA for final processing. If you need to upload additional files, this button will return you to Step One. This process needs to be completed for each worksheet/all files.

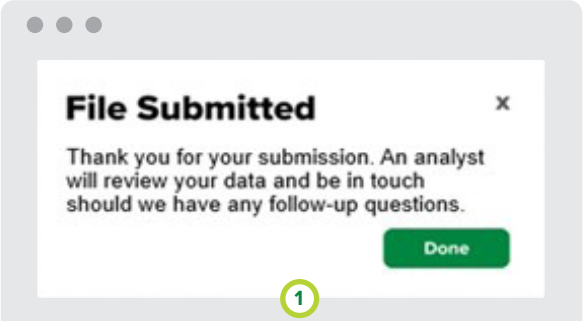


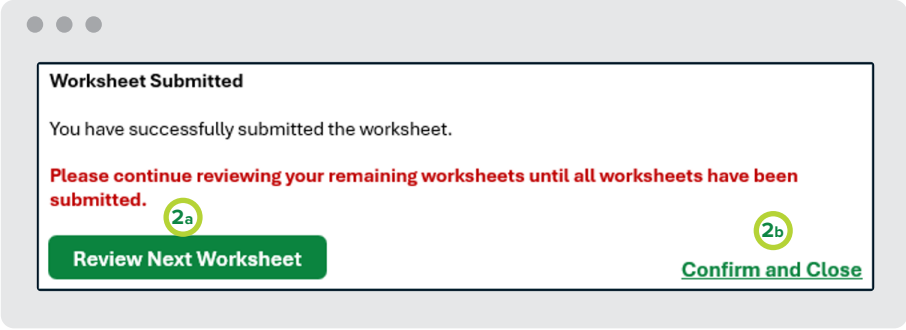
SUBMISSION COMPLETED!

After submitting your data, you will receive one of the following pop-up messages:

1. **File Submitted:** Confirms that your entire file (all worksheets) has been completed and your assigned analyst will be reaching out in the coming weeks, if any follow-up data is needed.

2. **Worksheet Submitted:** Confirms that your current worksheet has been received.
   - **2a.** You can either continue reviewing your pending worksheets or,
   - **2b.** close, and review your outstanding worksheets at a later time.





SUPPORT

Data Collection participation is as simple as that!
We understand you might still have questions, though.

CONTACT

Data experts are available Monday through Friday, 8:00 a.m. to 5:00 p.m. MT.

Call 877.275.6462, ext. 1895, email survey@mgma.com or set up a 1:1 with a data analyst **here.**

Visit **mgma.com/datacollection** for additional helpful resources and information.

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